

Slide 1

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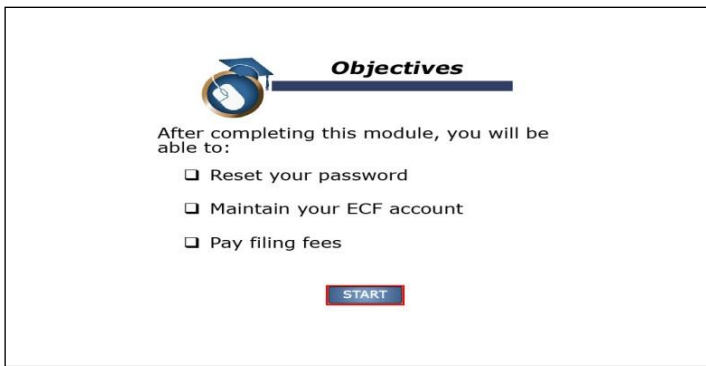
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Notes: Welcome to the training module on Managing Your Account. This module guides you through the best practices for maintaining your account up to date to enhance your efilng experience.



Slide 2

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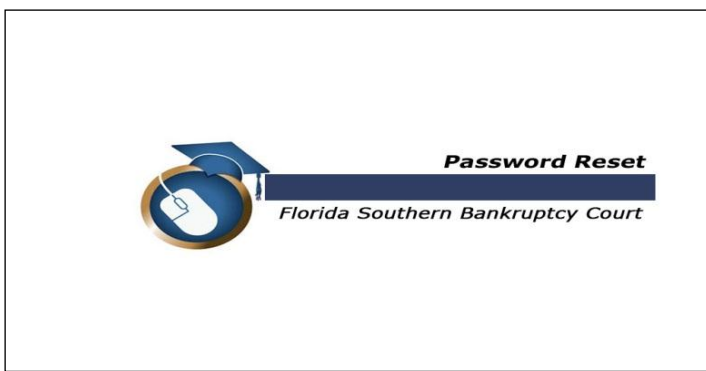
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Notes: After completing this module, you will be able to reset your password, maintain your ECF account, and pay filing fees. When you are ready to begin, click START.



Slide 3

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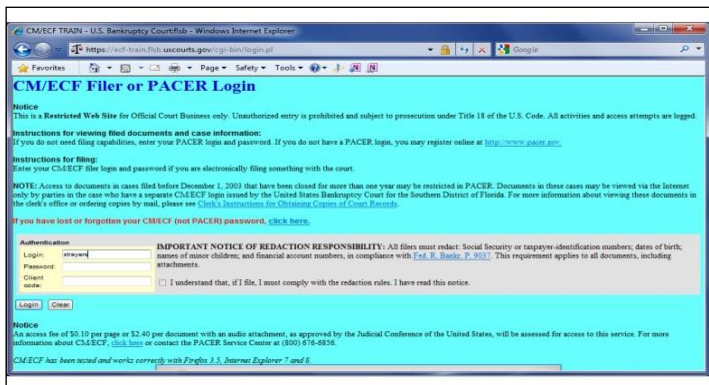
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Notes: Welcome to lesson on Resetting Your Password. Once you have successfully completed the Online Attorney Training program, you will receive your Live CM/ECF database credentials. Change your randomly generated password upon accessing your account for the first time. The clerk's office cannot retrieve your new password so take precautionary steps to keep your password accessible and secure. For the purpose of this tutorial, we will continue working in the Training database.



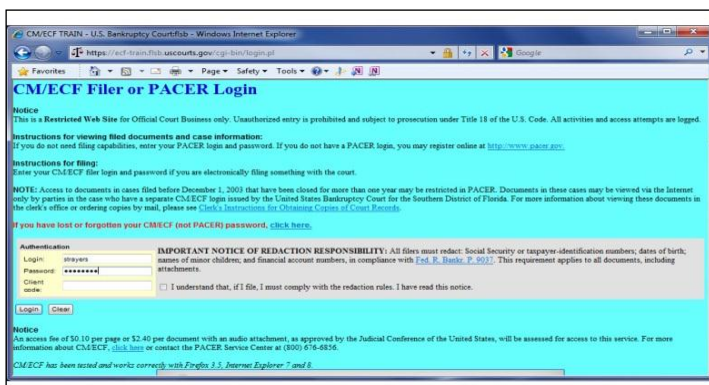
Slide 4

Notes: From the Home screen, click on the link titled Southern District of Florida – Document Filing System to continue.



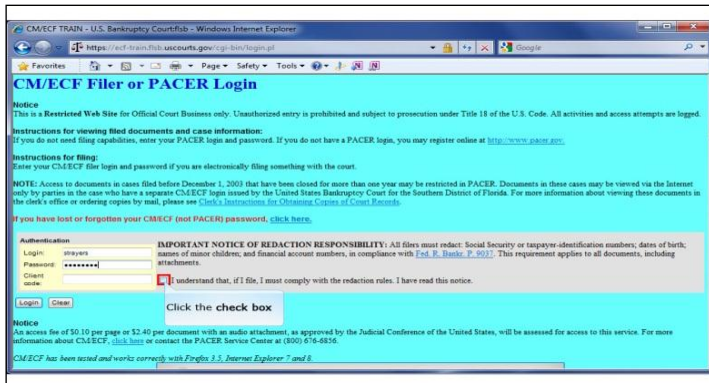
Slide 5

Notes: The CM/ECF Filer or PACER Login screen will appear. Your PACER credentials will not give you access to the ECF system. To access the filing database, you must enter the CM/ECF login and password provided by the court. For this tutorial, the information has been entered for you.



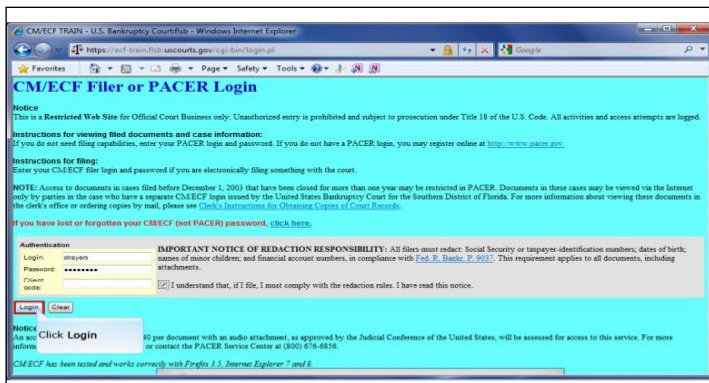
Slide 6

Notes:



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Notes: Additionally, click on the check box to acknowledge acceptance of the redaction responsibility associated with the filing process.



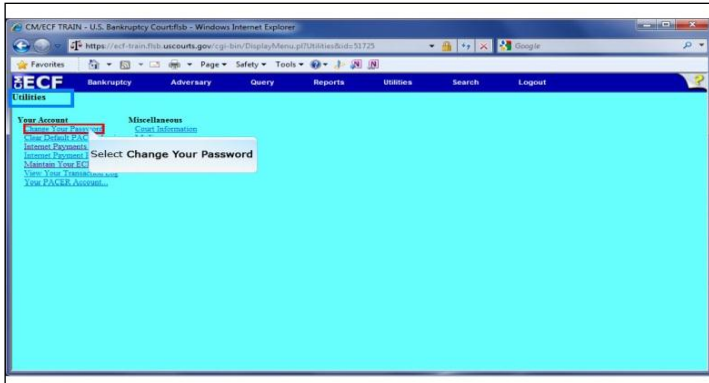
Slide 8

Notes: Click Login to start the process of resetting the password.



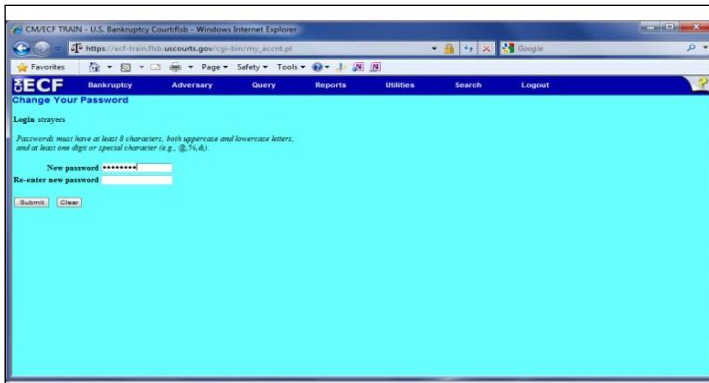
Slide 9

Notes: From the Main Menu bar, click Utilities.



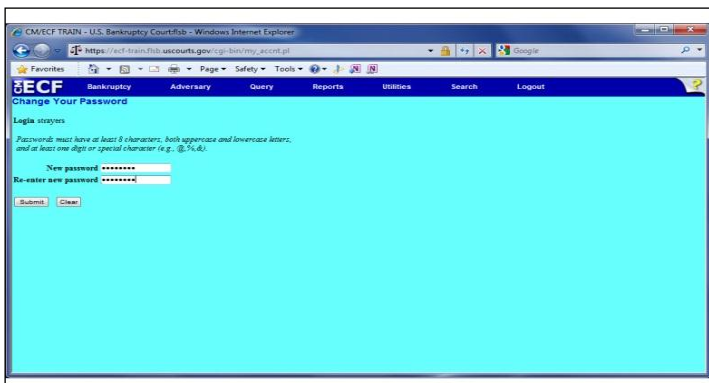
Slide 10

Notes: The Utilities menu will appear. Below the Your Account column, select Change Your Password.



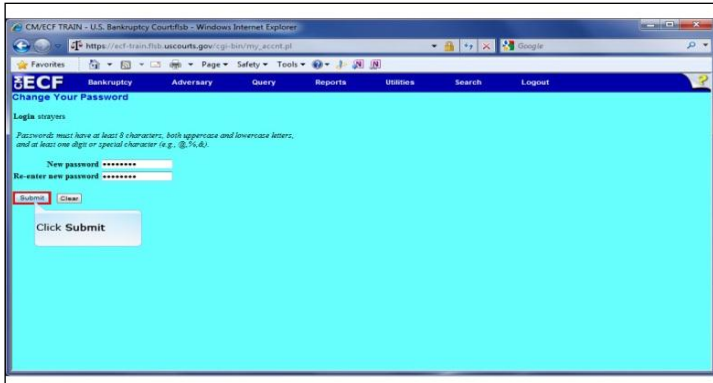
Slide 11

Notes: The Change Your Password screen will appear. For a strong password follow the instructions provided on the screen. Type the new password. Then, re-enter for confirmation. For this tutorial, the information has been entered for you.



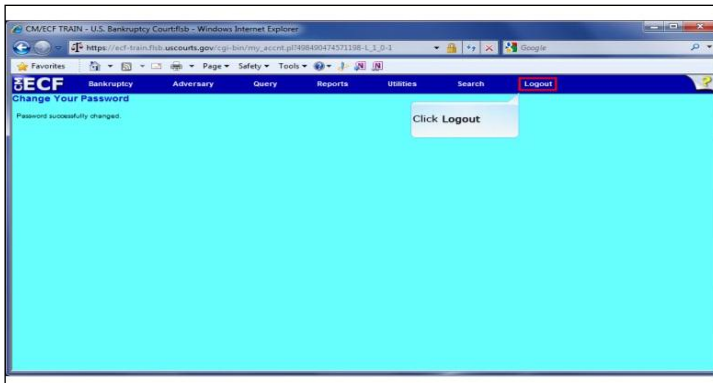
Slide 12

Notes: Your login credentials will become your signature on electronic documents for all purposes. The typewritten name of the registered user must appear on each document and match the login name of that registered user's ECF account.



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Notes: Click Submit to save the new password.



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Notes: You will receive confirmation that your password was successfully changed. Your login and password information now represents your electronic signature. You are responsible for its use. In the event of unauthorized use, notify the clerk immediately. Additionally, if you want CM/ECF to run efficiently, clear your cookies and cached files from your web browser. This should be done regularly for a better and consistent filing experience. In order to file documents and pay filing fees electronically, you will need to allow pop-up windows. Take the necessary steps to add the CM/ECF and Pay.gov websites to the allowed/permitted list. Also become familiar with the court's website and available resources. Logout and login again to access CM/ECF with your new password.



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Notes: Welcome to the lesson on Maintaining your ECF Account. Now that your password has been reset you are ready to modify account settings and maintain your ECF user account.



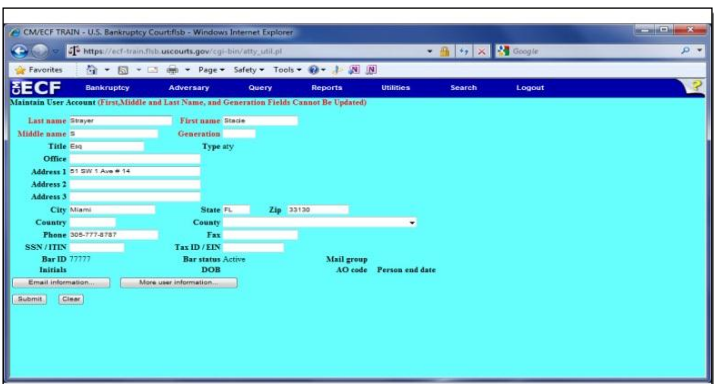
Slide 16

Notes: From the Main Menu bar, click Utilities.



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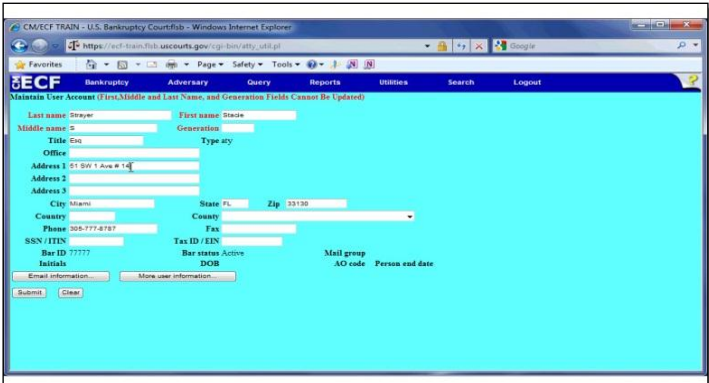
Notes: The Utilities screen will appear. Below the Your Account column, select Maintain Your ECF Account.



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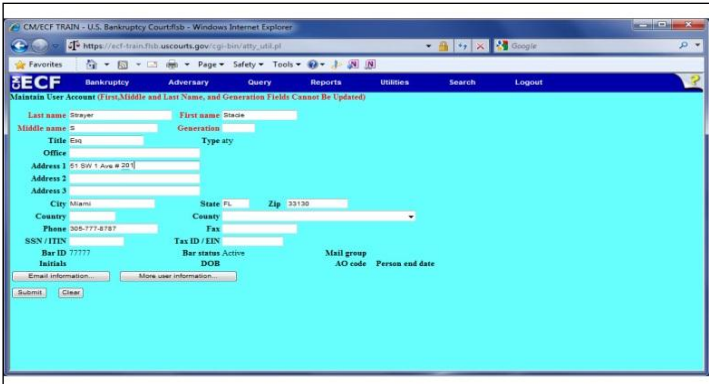
Notes: The Maintain User Account screen will appear. The data on this page reflects the information provided at the time your account was established with the court. If you need to make updates to your firm name or address, a Notice of Change of Address is required. You may update your phone or fax information on this screen. We will update the suite and phone number on our account. For the purpose of this tutorial the information has been entered for you.





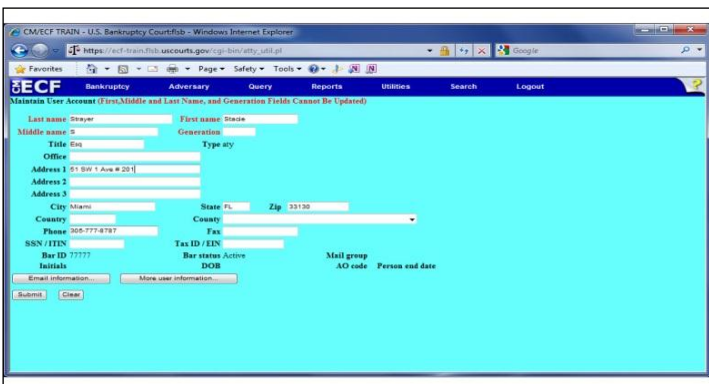
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Notes: Click on the Address 1 field and replace 14 with 201.



Slide 20

Notes:



Slide 21

Notes:

Slide 22

Notes: Then highlight the phone number and replace with 778-4265.

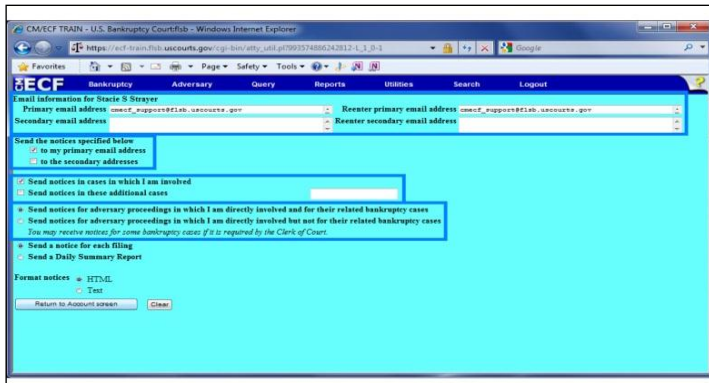
Slide 23

Notes: Once this update has been completed, we will take a look at the email settings and notification options.

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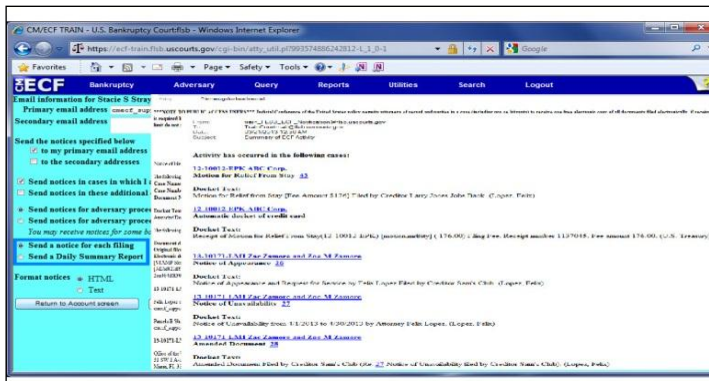
Notes: As a registered filer, you will receive notification of all documents from the Court electronically; including, documents filed by other filers and documents, notices, and orders entered by the Court. Click on the Email Information button to review the options available.





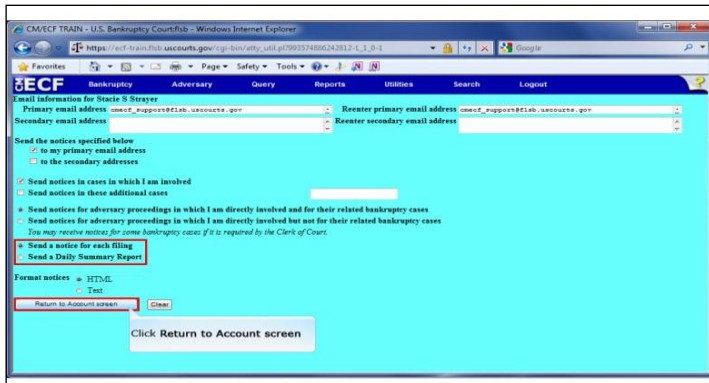
Slide 25

Notes: The Email Information screen will appear. For the purposes of this tutorial, we will review the options for email notifications but accept the system defaults. The primary email address was based on the information provided at the time your account was established with the court. A primary email address must always be maintained for the account and edited as needed by the registered filer. Electronic notification will be sent to the primary address listed. If you wish to have notices sent to additional recipients, add these additional address(es) in the secondary email address text box and reenter them to confirm. Separate multiple email addresses by pressing Enter on your keyboard. Select the check box to send notices to the secondary addresses. The individuals designated will receive electronic notification in all cases to which you are associated. Recipients will automatically receive notification for cases in which you have filed an appearance or other document. You have the option to receive notification for additional cases prior to appearing – such as for monitoring purposes – by selecting the check box to send notices in these additional cases and entering the case number(s) in the field box provided. You will be listed as an email recipient in the Notice of Electronic Filing (NEF). For adversary proceedings, you have the option to receive notices on related bankruptcy cases.



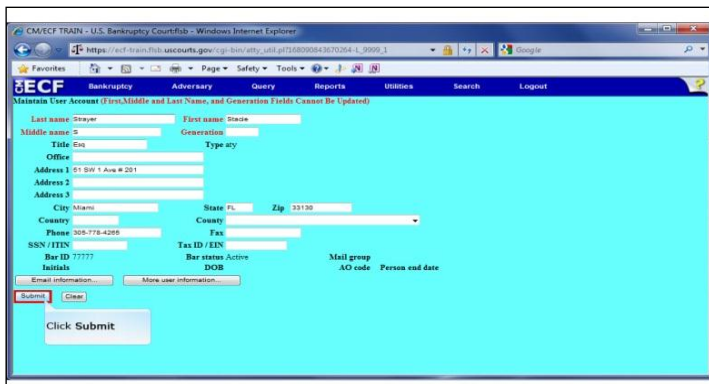
Slide 26

Notes: Every registered user who has made an electronic appearance in a specific case will be sent an NEF or Daily Summary Report. The system defaults to send a notice for each NEF. You may opt to receive a Daily Summary Report instead. The email received will provide the full NEF information for each filing entered in cases associated with your account. This includes case name and number, document number, date/time of entry, and parties received or not receiving electronic notification. If the Daily Summary Report is selected, you will receive one email per day detailing all activity from yesterday for cases in which you are associated. The notice will contain a limited summary of each transaction. This includes case number, document number, and docket text. Clicking on the links contained in the email notification will take you to the PACER login screen. You will be able to view the document once at no charge for a period of 15 days from the date the document is entered on the docket from your NEF email notification. If you have opted to include additional notification recipients through your account email settings, the first recipient to view the document will get the free look; other viewers will be charged applicable PACER viewing fees. Additionally, forwarding the email notification or double-clicking on the docket number results in the loss of the free look. If you have elected to receive notification in "additional cases," you do not receive a free look at the documents associated with those filings.



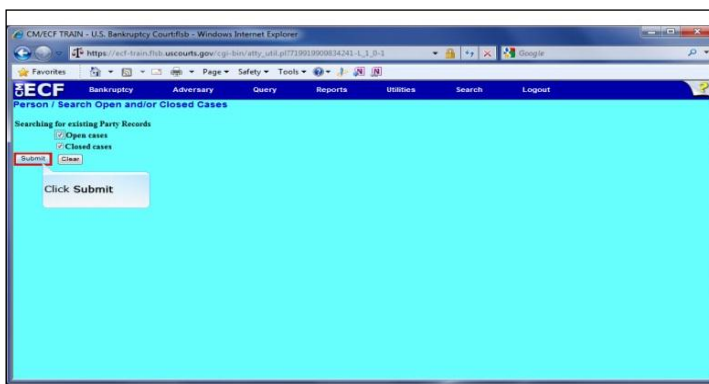
Slide 27

Notes: Choose one format to receive case specific notifications. By default these notifications will be sent in HTML format. If you prefer plain text format, select the TEXT option instead. However, choosing the plain text format eliminates receipt of the PDF image associated with the filing. To finalize the settings, verify the account information is current. The Clear button will clear all field boxes and restore default selections. Clicking on the browsers Back button to return to the previous screen when changes have been made will result in the loss of updated information. If any changes have been made to this page, click the Return to Account Screen button to save all changes on this page.



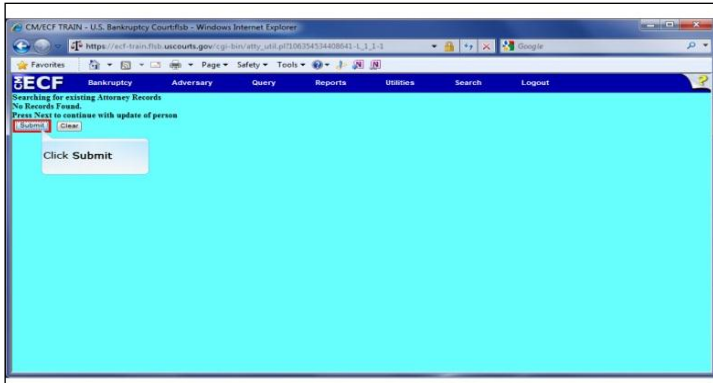
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Notes: Click Submit to commit these account changes to CM/ECF.



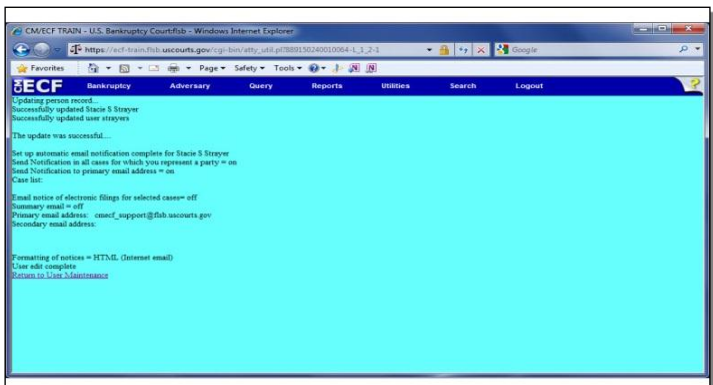
Slide 29

Notes: The Party Records screen will appear. This screen will search for party records to update cases with these changes. Accept the default section of Updating All and click Submit to continue.



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Notes: At the Information Screen, click Submit.



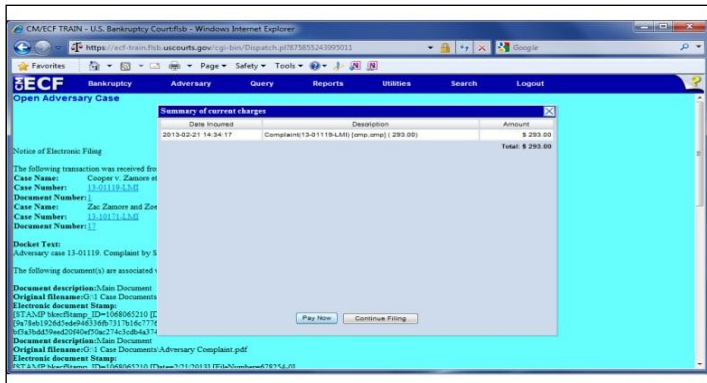
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Notes: The Confirmation screen will appear with a summary of changes made and serves as a receipt for updates to account settings. Now that your ECF account has been updated and your preferences for notification selected, we will move on with how to pay for filing fees in the next lesson.



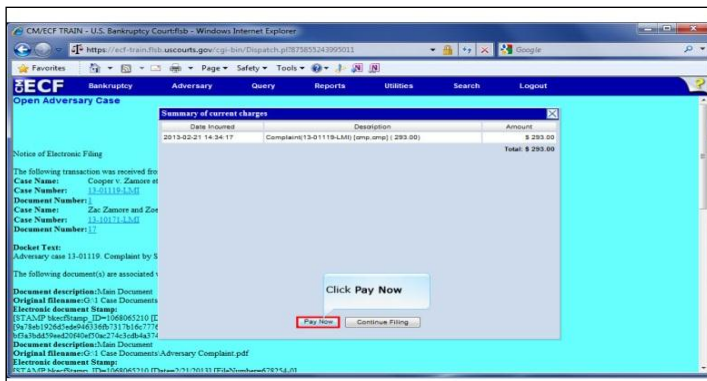
Slide 32

Notes: Welcome to lesson on Paying Filing Fees. All fee-based transactions must be paid by 3:00 a.m. daily or an account becomes suspended. This module guides you through the process of paying filing fees for two scenarios: current fees and past due fees. We will begin with paying current fees.



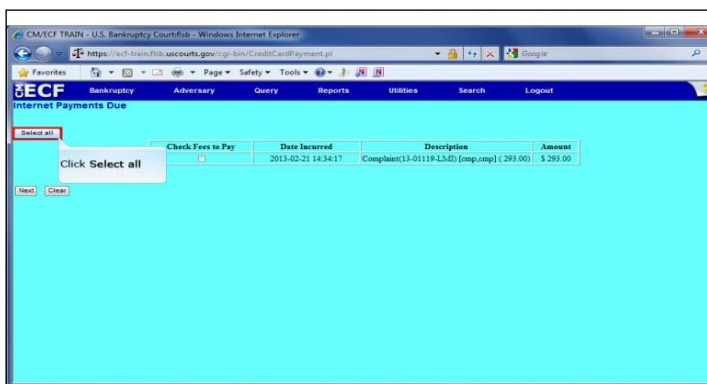
Slide 33

Notes: Immediately following the filing of a fee-based transaction, the NEF screen will appear along with the Summary of Current Charges dialog box. The pop-up window will show a summary of current fees due. In order for this window to display properly, enable pop-ups from the court's website. If the pop-up window does not display or it appears blank for a document that requires a filing fee and your pop-up blockers are properly set, do not assume that no fee is due. Contact the Help Desk in the division where the case is pending for necessary steps to facilitate the payment for your transaction(s). Refrain from using the browsers Back button or closing the Summary of Current Charges window. Use the program buttons to complete your transactions.



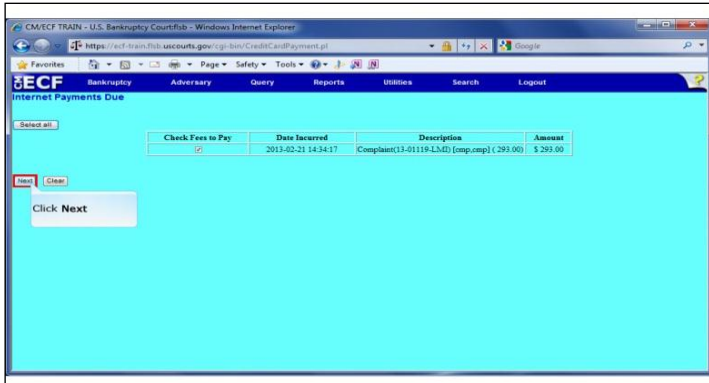
Slide 34

Notes: In this case, the amount is accurate. Click Pay Now to start the payment process for the current filing fees.



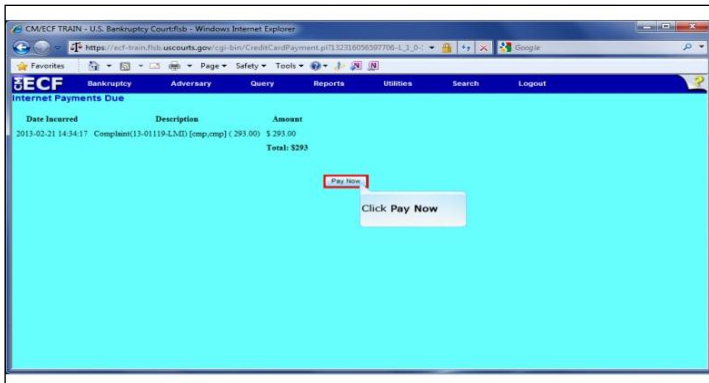
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Notes: The Internet Payment Due screen will appear. To ensure that all pending charges are automatically checked for payment and to avoid the potential suspension of filing privileges for outstanding fees, click the Select All button.



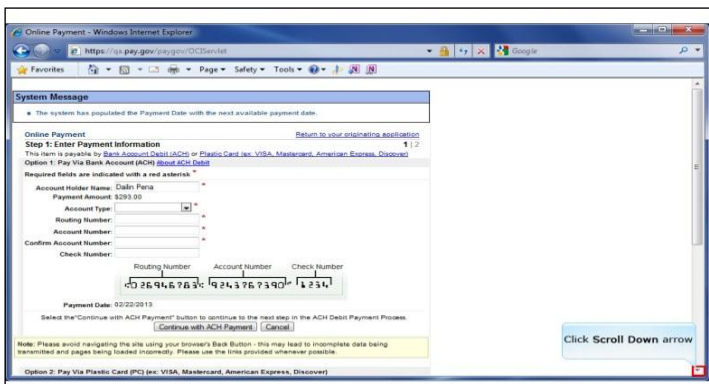
Slide 36

Notes: Verify all items for payment are checked and click Next.



Slide 37

Notes: The Confirmation screen will appear. Verify all selected fees to pay are displayed and click Pay Now.



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Notes: The Online Payment screen will appear. You have been redirected to the Pay.gov interface to process your electronic payment. Internet Explorer and Mozilla Firefox are the browsers supported by the payment center. We will be paying fees using a credit card. Click the Scroll Down arrow to view the rest of Option 2.



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Notes: Only the field with a red asterisk is required. You will notice that certain information from your ECF user account carries over to this screen and should not be changed. The credit card information will need to be entered each time you want to settle your filing fees. Acceptable forms of payment are displayed by Card Type and can be selected from the menu options. For the purpose of this tutorial, the credit card information has been entered for you.

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Notes: Click Continue with Plastic Card Payment to process the information provided.

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Notes: The Authorize Payment screen displays. The Payment Summary area defaults with the previously entered information. Verify the information is accurate before you continue. Click on Edit the Information if you need to correct the information provided in the previous screens. You may request to have a confirmation receipt sent to the email address entered and have other recipients copied as well. To authorize payment, click on the check box with the red asterisk.



Online Payment - Windows Internet Explorer

Step 2: Authorize Payment

Payment Summary

Account Holder Name: Caitlin Faria

Billing Address 1: 51 SW 1 St

Billing Address 2: City Miami

State / Province: FL

Zip / Postal Code: 33130

Country: USA

Account Information

Card Type: Visa

Card Number: 1111

Payment Information

Payment Amount: \$293.00

Transaction Date: 02/21/2013 14:35 and Time: EST

Email Confirmation Required

To have a confirmation sent to you upon completion of this transaction, provide an email address and confirmation below.

Email Address:

Confirm Email Address:

CC:

Authorize and Disclosure

Required fields are indicated with a red asterisk \*

I authorize a charge to my card account for the above amount in accordance with my card issuer agreement.

Press the "Submit Payment" button only once. Pressing the button more than once could result in multiple transactions.

Submit Payment Cancel

Note: Please avoid navigating the site using your browser's Back button and pages being loaded incorrectly. Please

Click Submit Payment

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Notes: Click Submit Payment to complete this transaction.

Online Payment - Windows Internet Explorer

https://on.pay.gov/on.gov/payments/authorize/PlasticCardPayment.html

Your request is being processed. Please wait.

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Notes: Do not use the browser's Back button to revisit previous screens during the processing of the payment. Instead, wait for the Payment Confirmation screen.

CM/ECF TRAIN - U.S. Bankruptcy CourtHub - Windows Internet Explorer

https://cmecf-train.fls.uscourts.gov/cmecf-train/transactional

Thank you. Your transaction in the amount of \$ 293.00 has been completed.

Please print a copy of your transaction receipt for future reference. The transaction number is 1122511.

Detail description:

Complaint(13-01115-LMD) [mmp.mmp] ( 293.00)

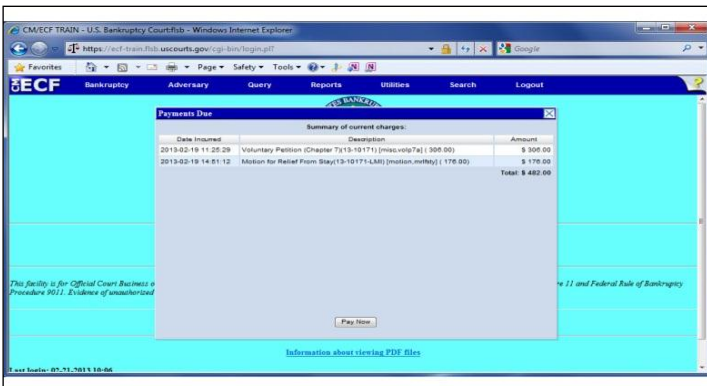
Slide 44

Notes: A Payment Confirmation screen will appear. It provides a copy which can be printed or saved for future reference and a transaction number as receipt for payment. If there was an error during the payment process, you might receive a message directing you to contact your card issuer or the Clerk's office for assistance. Do not attempt to pay the filing fees again since this may compound the problem further. Contact the Help Desk for the Division where the case is pending. Be prepared with the transaction number when calling.



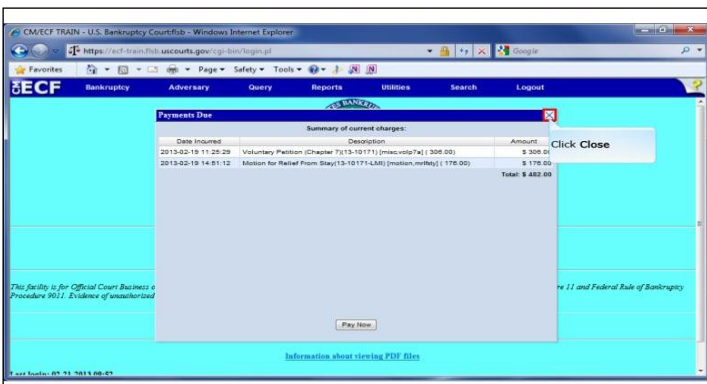
Slide 45

Notes: Welcome to the lesson on Paying Outstanding Filing Fees. This lesson guides you through the second scenario: past due fees. Failure to pay filing fees, within 24 hours, may result in the matter being brought to the attention of the judge assigned to the case, who, without further notice or hearing, may impose sanctions.



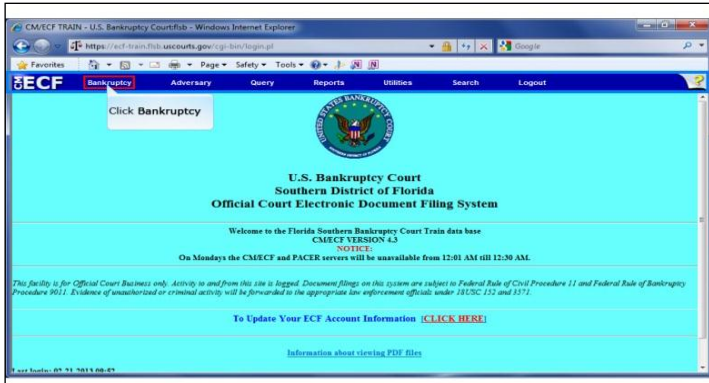
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Notes: The payment of past due fees can be paid at the Payment Due window or through Utilities from the Main Menu bar. Fees associated with the filing of multiple documents can be paid in a batch transaction. Each attorney in a firm must pay any past due fees using their individual login and password. When your account has outstanding fees you will notice that the Payment Due dialog box appears with Pay Now as the only option. This is an indicator that your account has been suspended.



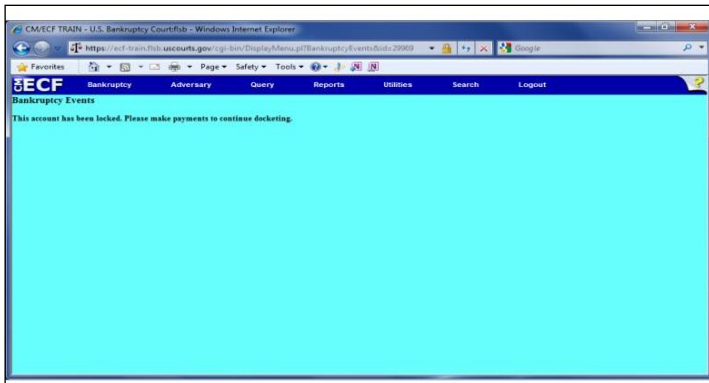
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Notes: If you ignore this prompt and Close the window to continue filing, the Payment Due dialog box will not appear again.



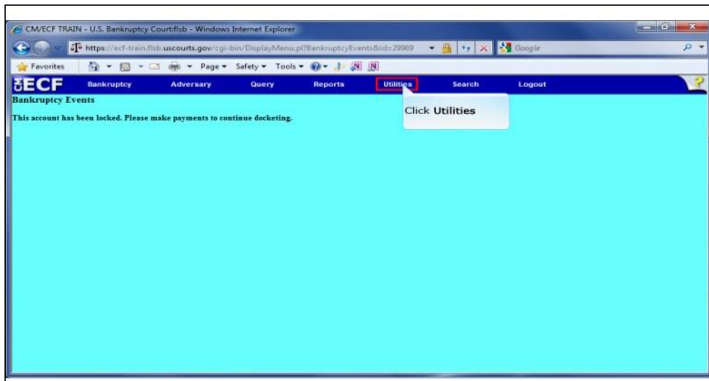
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Notes: Since we did not select to Pay Now, when you click on Bankruptcy or Adversary from the Main Menu bar



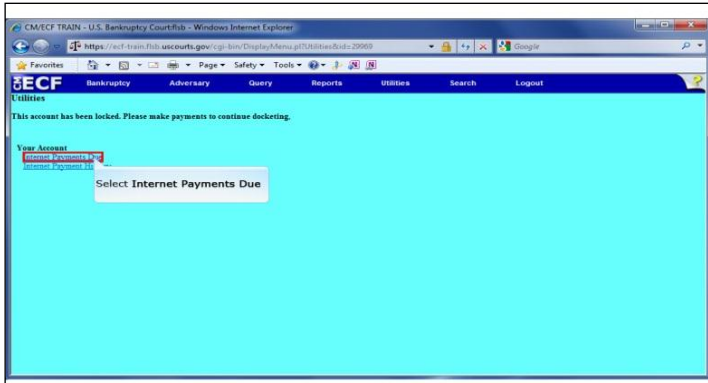
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Notes: a list of available events will not be displayed. Instead, you are notified that your account has been locked and payment is needed to continue filing.



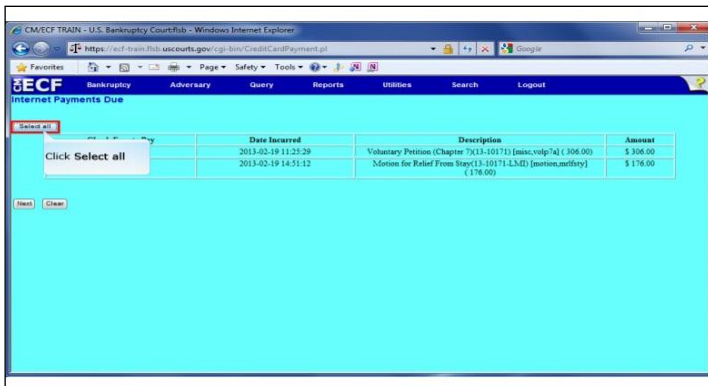
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Notes: You will have to manually select to pay your outstanding fees through Utilities in the Main Menu bar.



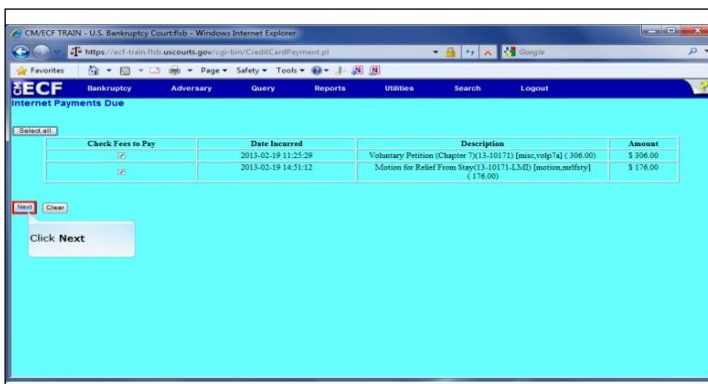
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Notes: Below the Your Account column, two options are listed. Internet Payments Due reflects all past due fees. Internet Payment History allows electronic filers to view a report listing the fees paid within a given date range. Select Internet Payments Due.



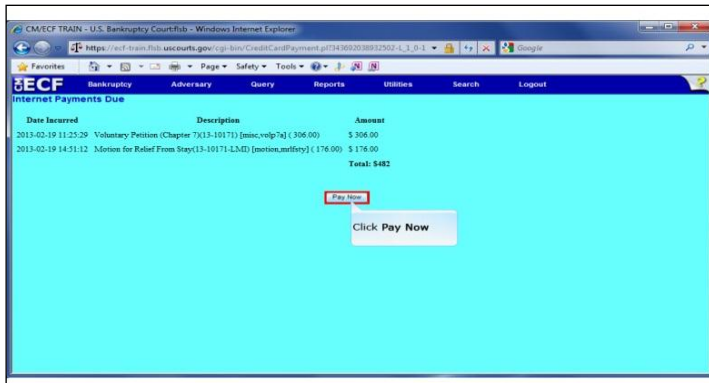
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Notes: The Internet Payment Due screen will appear. Use the Select All button to ensure that all pending charges are automatically checked for payment.



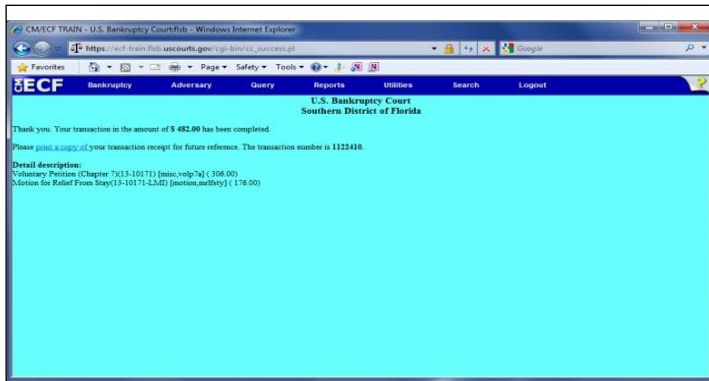
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Notes: Verify all items for payment were checked and click Next.



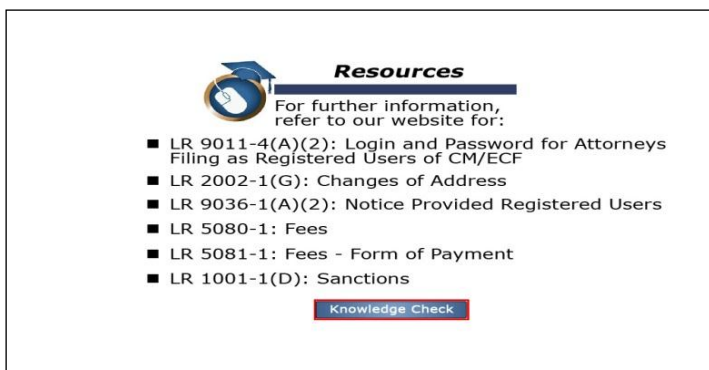
Slide 54

Notes: The Confirmation screen for your selections will appear. Verify all selected fees to pay are displayed. For this tutorial, we will not simulate paying for fees. Select Pay Now.



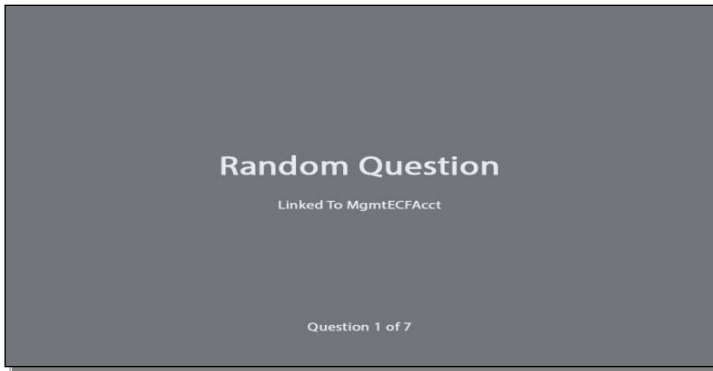
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Notes: The Payment Confirmation screen will appear. Before attempting to file another document, log out of the system and log back in to reactivate your account. The Bankruptcy Events listing will no longer be locked enabling you to continue filing.



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Notes: For further information, take a moment to review the listed resources available on our website. When you are ready, click the Knowledge Check to continue.



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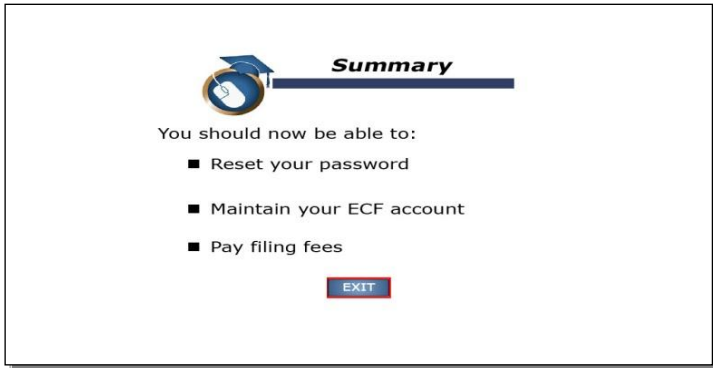
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Notes: Knowledge Check



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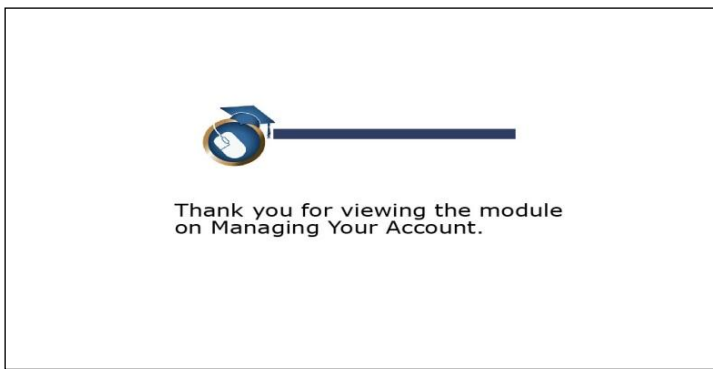
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Notes: Now that you have reviewed this learning module, you will be able to a reset your password, maintain your ECF account, and pay your filing fees. Upon your successful completion of all modules within the Online Attorney Training program, you can move on to Step 3 to request your Live Login. Click EXIT when you are finished.



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Notes:




Question 1

 Knowledge Check	Question 1 of 7
<p><b>Which of the following disables a “free look” of a PDF document from an NEF email:</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> A) reviewing 15 days after receipt of NEF email</li> <li><input type="radio"/> B) forwarding the NEF email after it has been viewed</li> <li><input type="radio"/> C) NEF email received for additional cases you are monitoring</li> <li><input type="radio"/> D) all of the above</li> </ul>	


Notes:

Question 2

 Knowledge Check	Question 2 of 7
<p><b>Click the following link to check for outstanding payments:</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> A) Manage Your ECF Account</li> <li><input type="radio"/> B) View Your Transactions</li> <li><input type="radio"/> C) Internet Payment Due</li> <li><input type="radio"/> D) Internet Payment History</li> </ul>	

Notes:

Question 3

 Knowledge Check	Question 3 of 7
<p><b>Complete the sentence below by filling in the blanks.</b></p> <p>To make changes to how you are electronically notified, select <span style="border: 1px solid black; padding: 2px;">--Select--</span> from the Utilities categories listed.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;">             Mailings              Court Information              Maintain Your ECF Account              Change Your Password         </div>	

Notes:



## Knowledge Check

Question 4 of 7

**When your payment request is being processed, do the following to ensure that the transaction is not disrupted:**

- ☐ A) wait for the confirmation screen
- ☐ B) revisit previous screens
- ☐ C) toggle between windows
- ☐ D) exit the program

Notes:

Question 4



## Knowledge Check

Question 5 of 7

**Maintenance of email information, especially for the primary email, and noticing preferences is the responsibility of the:**

- ☐ A) Clerk's Office
- ☐ B) owner of the account
- ☐ C) paralegal
- ☐ D) other users

Notes:

Question 5



## Knowledge Check

Question 6 of 7


**Filing fees for petitions and other fee-based transactions must be paid by 3:00 a.m. next calendar day to avoid suspension of filing privileges.**

- ☐ A) True
- ☐ B) False

Notes:

Question 6

Question 7

 Knowledge Check

Question 7 of 7

Once you are logged in, your user credentials become your electronic signature on all documents filed with the court.

☐ A) True

☐ B) False

Notes:

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